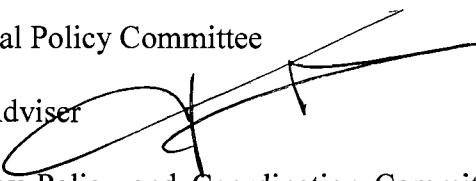


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MEMORANDUM

October 27, 2011

TO: Government Operations and Fiscal Policy Committee

FROM: Dr. Costis Toregas, Council IT Adviser 

SUBJECT: Update - Interagency Technology Policy and Coordination Committee (ITPCC) Cross Agency Resource Sharing (CARS) projects

Expected to attend

Fariba Kassiri, Assistant Chief Administrative Officer, Montgomery County Government
Sherwin Collette, Chief Technology Officer, Montgomery County Public Schools, and Chair, CIO Subcommittee, ITPCC
Gary Thomas, Manager, ITPCC

Chief Information Officers from participating agencies will be in attendance and able to comment on specific projects.

Summary of Staff Recommendations:

1. Suggest that the upcoming CARS Principals meeting on November 7, 2011 establish a timeframe for FY13 budget recommendations that focus on cross agency actions in the IT field.
2. Encourage ITPCC to explore Cloud Computing solutions that could increase productivity across agencies; a starting point could be a County-wide and agency-wide calendar of events that would present unified information to County residents.
3. Explore ways to move projects forward without the use of outside consultants, using the on-board talent of agency personnel.

Background

On February 3, 2010, the heads of MCG, MCPS, Montgomery College, M-NCPPC, and WSSC, and the Council Staff Director held the first Cross Agency Resource Sharing (CARS) Executive Committee meeting. The main objective was seen as working together and reaching a high level of cross agency collaboration and partnership towards improving the County's long-term budget challenges and

sustainability of services. At that time, although several cost-saving and service-improving ideas had been developed and discussed, the timing to impact the FY11 budget was deemed unrealistic for explicit implementation of these ideas, so the focus of the 9 subcommittees was to consider fresh (and tried-and-true) ideas that might improve the FY12 budget.

One of these subcommittees was in the Information Technology arena. Since the Interagency Technology Policy and Coordination Committee (ITPCC) already had a CIO Subcommittee to address technology issues across agencies, the decision was made to use that structure, expanding it to include Dr. Costis Toregas, Council IT Adviser.

The balance of FY10 and much of FY11 was taken up with defining projects, prioritizing them into a short list, and assembling teams of experts that would look for improvement opportunities. By December 8, 2010, the IT Subcommittee had presented 7 distinct projects (see ©1-2) to address:

- Mobile Data/Voice contract consolidation
- IT Help Desk Services consolidation
- Cross Agency Language translation services cooperative
- Interagency GIS Strategic Plan 2010 Implementation Plan
- Mobile and Wired Voice/Data Communications
- Contractual and Procurement Cooperative consolidation
- Joint Use and Data Center consolidation

For a variety of reasons, the CARS IT Subcommittee was not able to make any explicit recommendations during the FY12 budget period; it is easy to understand that the work put into these efforts was of great help to individual agencies and their own budget work.

We are now coming up to the FY13 budget cycle, and the hope is strong that there will be explicit recommendations that will have either a service improvement or a cost decrease impact across agencies in their uses of technology. The vehicle to test this hypothesis is the status reports on projects that are active (©3-5). Four such projects have been moving forward:

- Mobile Data/Voice contract consolidation
- IT Help Desk Services contract consolidation
- Joint Use/Data Center consolidation
- GIS Strategic Plan (implementation phase)

It should be noted that this update has been approved by the CIO Subcommittee and is on the agenda of the full CARS Executive Committee for approval in their upcoming November 7, 2011 meeting.

ITPCC CIO Subcommittee Chair Sherwin Collette and Assistant CAO Fariba Kassiri, who handles CARS projects coordination, will be at the GO Committee meeting to discuss this update report.

Staff Comments

1. The status reports on ©3-5 indicate that while some progress has been made, concrete results to date are limited. Missing the FY11 budget cycle in terms of cross agency recommendations was totally understandable. The fact that the FY12 budget effort was extremely difficult and complex provides a partial explanation for missing that target. However, the FY13 budget effort

is now under way, and a reading of the status reports does not reveal any explicit suggestion that might result in service or cost impact across agencies. Perhaps the discussion with the GO Committee will highlight action steps being planned by the CARS Subcommittee or the Executive Committee that are not yet visible and that will have a FY13 budget impact.

2. It is clear that results in the target areas will be beneficial to individual agencies. For example, in the cell phone consolidation area, it appears that consolidating multiple accounts for each of the 3 vendors for each agency could produce efficiencies. However, the same approach seems to be discounted for cross agency implementation. It is possible, though, that single contracts across agencies could have significant improvements in the management of cell phone use, establishment of cross agency rules for their use, and practical ways to reduce overall costs.
3. The GO Committee heard some months ago that Cloud Computing was well in use in all agencies. Once again, though, cross agency use of this technology seems to be under-emphasized or lacking. A simple example may make this point more clear. Calendaring of public events is something that every department has to do and provide to County residents. Cloud Computing solutions for calendaring would enable all agencies to use the same system (with different editing privileges and security measures, of course) that would permit residents to go to a single place and find all events that may of interest to their families without visiting multiple websites. This shared calendaring function could be followed by other technology platform consolidations, with the same result of making things easier for residents.
4. The reporting relationship between the IT Subcommittee and the CARS Executive Committee is a session once every six months, where each of nine subcommittees presents their ideas and requests. A more aggressive schedule, with perhaps more time given to each subcommittee, could have a beneficial effect on outcomes that can provide better services across agencies.
5. In two of the projects (Help Desk and Data Center consolidation), the only way forward is proposed to be a consultant study, and the expense appears to be prohibitive. Therefore, unless resources are found from other sources, no action will be taken. Yet there is real opportunity for improvement. The Committee may want to explore ways that progress can be made without expensive consultant engagements, using the talents of the top-flight professionals in the agencies.

Subcommittee	Recommendation	Response	Implement. Date	Subcommittee Suggested Implementation Dates & Projected Cost Savings	Discussion of Challenges/Obstacles	Next Steps
Information Technology	1. Mobile Data/Voice Contract Consolidation	In order to avoid the high up-front cost, we recommend implementing this in three phases. Phase I: Examine and pursue cross-agency "contracts" consolidation to a single contract for each provider. Phase II: Examine, validate and pursue cross-agency "accounts" consolidation. Phase III: Examine, validate and pursue cross-agency consolidation of warehousing, distribution, maintenance services of mobile data/voice devices.	Phase I: FY12 Phase II: mid-year FY12 Phase III: FY13	Phase I: FY12; Phase II: mid-year FY12; Phase III: FY13	Contract vehicles and schedules differ widely among agencies, some with strict federal eRate regulations which affect scope and schedule. These challenges will be explored by the project team. Phase II and Phase III implementation dates may change depending on Phase I outcomes.	Project team members have been identified. Project sponsor is Sherwin Collette (CTO - MCPS); project manager is Cary Kuhar (Director of Infrastructure & Ops - MCPS). Project kickoff meeting has been scheduled to define the project charter, scope, schedule and deliverables. First in-scope activity will be to perform an interagency survey on mobile data/voice needs, usage, costs, and contract vehicles.
Executive Summary of Recommendations	2. IT Help Desk Services Consolidation	In order to avoid the high up-front cost, we recommend implementing this in two phases. Phase I: Examine the current IT Help Desk Service contracts of the six county agencies and conduct delineation of "service types" and "service levels" for each agency. Evaluate the information and develop an acceptable cross-agency standard for "type and level of services". Phase II: Examine the information and pursue cross-agency consolidation of IT Help Desk Services.	Phase I: FY12 Phase II: mid-year FY12	Implementation dates for each phase will be defined in the project plan. The plan will be developed by the end of January 2011.	length of contracts, bidding may require separate board/agency approvals, different systems requiring different expertise, the population served will include students not just agency employees,	The project working group is scheduled to meet in mid-December to define project charter, scope, deliverables and timelines. The subcommittee's proposed implementation dates may change once the project plan has been developed.
Detailed Recommendations Report	3. Cross Agency Language Translation Services Cooperative	Great suggestion. While the translation process depends heavily on sophisticated translation management software called WorldServe, from a partnership point of view, this action item can be handled by the Administrative Subcommittee. IT Subcommittee should continue to provide support, as needed, to Administrative Subcommittee for successful implementation of this project.	See Administrative Subcommittee	See Administrative Subcommittee	See Administrative Subcommittee	See Administrative Subcommittee
	4. Interagency GIS Strategic Plan 2010 Implementation Phase	Approved; but we recommend the following two phase approach. Phase I: Proceed with finalizing the Interagency GIS Strategic Plan and establish an inter-agency GIS Policy/Governance Committee. The first task of the GIS Policy/Governance Committee should be to delineate the types of data/information and their collection and storage methods by each agency. In addition, the new GIS Committee should review the current GIS information layers that are scheduled to be purchased by each agency, and coordinate expenditures on the data. The committee needs to immediately curtail the environment that allows a single agency to independently purchase expensive layers (or software) that are explicitly intended for multi-agency use. Phase II: Examine and develop a strategy to reduce cost and also maximize the "use and accessibility" of data/information for/by all agencies. In addition, the GIS committee should identify and prioritize the GIS analysis projects that offer the County the greatest potential benefit, and to assign a lead agency to each project. The final suggested strategy by the GIS committee should include	Phase I: FY12 Phase II: mid-year FY12	Phase I: mid-FY12; Phase II: mid-FY13	None.	1. December 8, 2010, comment draft of GIS Governance structure recommendations to CIO Subcommittee; (2) December 17, 2010, comment draft of completed GIS Strategic Plan to CIO Subcommittee for review and approval; (3) January 2011, ITPCC review and approval of GIS Strategic Plan; (4) implementation begins.

Subcommittee	Recommendation	Response	Implement. Date	Subcommittee Suggested Implementation Dates & Projected Cost Savings	Discussion of Challenges/Obstacles	Next Steps
Information Technology (Continued)	5. Mobile and Wired Voice/Data Communications	Continue the initial work with the goal of implementing in FY13.	Post FY12	mid-Post FY13	Implementation and schedule will be subject to adequate and available resources and determination of project scope and deliverables.	To be determined.
	6. Contractual and Procurement Cooperative/Consolidations	Move implementation of this effort to FY12. Refer to General Note 1 in Procurement section. It is understood that cooperative purchasing currently available to MCPS and Montgomery College for purchase of selected equipment/goods may result in greater savings. But all options must be evaluated	FY12	mid-FY12-FY13	See General Note 1 in Procurement section. Procurement subcommittee will need to initiate and lead this effort. Implementation and schedule will be subject to adequate and available resources and determination of project scope and deliverables.	Procurement offices will need to generate IT related listings of services and providers, consolidate listing, identify overlap and duplications; determine potential for cost savings.
	7. Joint Use and Data Center Consolidations	Move implementation of some aspects of this effort to FY12. We suggest a four phase approach: Phase I: The Executive Branch conduct a comprehensive Business Impact Analysis (BIA) of their current data centers. Phase II: All other agencies, in an effort to develop a joint alignment for identification of current needs/resources, use the Executive Branch BIA study model and develop a similar BIA analysis. Phase III: Use the collected data (BIAs) and develop cross-agency data center optimization or, if possible, consolidation opportunities/options. Phase IV: Select an option and define the short-term capital investment that yield the maximum long-term operational savings and develop the implementation plan.	Phase I: FY12 mid-year FY12 Phase II: FY13 Phase III: FY13 Phase IV: mid-year FY13	Alternative Timeframe • Phase I: FY12 • Phase II: FY13 • Phase III: FY14 • Phase IV: mid-year FY14 Savings Estimates • Savings to be determined • Savings opportunities will depend on alignments between agencies from BIA assessments • Savings will also depend on optimized resource locations and facility costs (expansion / modifications / environment changes) • Potentially adding cost for distant location selection for local area disaster avoidance	• MCG BIA process is not complete. Assumptions include repeating the process defined by MCG for other agencies • Costs for MCG BIA still uncertain. Repeating BIA for infrastructure alignment assumes agency funding capability • Joint data center requirements may exceed current available footprint • Funding for transition planning has been unavailable; funding for actual implementation will be required before any savings can be realized • Savings for any optimization effort will be based on continued green technology acquisitions, portability/failover of current systems and identifying resource replications • Remote data center model options for regional disaster recovery has not been included in cost equation	• Complete MCG BIA and portfolio assessment • Issue MCG BIA to MCCATS and LCATS vendors • Evaluate responses and cost proposals • Execute detailed BIA for MCG assessment • Evaluate BIA data collection and portfolio with business system priorities • Identify lessons learned from MCG BIA and identify changes to support multi-agency use • Identify correlation processes with each agency to determine synergies and data center optimization options
	8. Miscellaneous Other	Continue your cross-agency collaborative efforts with the goal of implementing new cost saving ideas in FY13 and beyond	Post FY12	Post FY13	Implementation and schedule will be subject to adequate and available resources and determination of project scope and deliverables.	To be determined.

CARS IT Project Updates
An Update for the GO Committee
October 10, 2011

1. Mobile Data/Voice Contract Consolidation

- **Phase I:**
 - Examine and pursue cross-agency “contracts” consolidation to a single contract for each provider [FY12]
- **Phase II:**
 - Examine, validate and pursue cross-agency “accounts” consolidation [mid-year FY12]
- **Phase III:**
 - Examine, validate and pursue cross agency consolidation of warehousing, distribution, maintenance services of mobile data/voice devices.[FY13]

Project Sponsor is Sherwin Collette (CTO-MCPS);

Project Manager is Cary Kuhar (Telecom Manager-MCPS);

October 10, 2011: Report (written only) to the GO Committee.

- Survey was completed by all project team members.
- Contract consolidation options were analyzed.
- Three (3) mobile device vendors are used by agencies. Contract consolidation was deemed unnecessary because it was found that all agencies are already using common contracts for these vendors.
- Efficiencies within each agency may be possible by consolidating multiple accounts for each vendor.
- Final analysis and report are being prepared for team review.
- Final report is being prepared for presentation of recommendations to the CIO Subcommittee on October 11, 2011, and the CARS Executive Committee on November 7, 2011

2. IT Help Desk Services Contract Consolidation:

Phase I:

- Examine the current IT Help Desk Service Contracts of the six County agencies
- Delineate ‘service types’ and ‘service levels’ for each agency
- Evaluate and develop an acceptable cross-agency standard for ‘type and level of services

Phase II:

- Examine the information and pursue cross-agency consolidation of IT Help Desk Services.

Project sponsor is Dr. Mike Russell (CIO-Montgomery College);

Project Manager is Kathie LaMartina (IT Client Services Manager, Montgomery College);

October 10, 2011: Report (written only) to the GO Committee.

- Site visit to County 311 Center completed April 2011.
- Data analysis performed in May 2011. The analysis found significant disparities in business focus, scope, constituencies, and technology environment, particularly in the area of supported applications while there are numerous similarities in tools and services.
- Developed report with findings and recommendations in June 2011. Recommendations are based on the data analysis of each agency's Help Desk and an assessment of the recommendations ability to satisfy stated business requirements.
- Short-term recommendations suggest continuing the dialog between agencies.
- Long-term recommendations include the initiation of a formal procurement solicitation to retain the services of a consultancy to complete a consolidation study and cross-agency strategic plan.
- In July 2011, the report was finalized and referred to the CIOs for their consideration in August 2011.
- CIO-CARS IT workgroup review is scheduled for October 11, 2011.

3. Joint Use/Data Center Consolidations

Phase I:

- The Executive Branch conducts a comprehensive Business Impact Analysis (BIA) of their current data centers. [FY12]

Phase II:

- All other agencies, in an effort to develop a joint alignment for identification of current needs/resources, use the Executive Branch BIA study model and develop a similar BIA analysis. [mid-year FY12]

Phase III:

- Use the collected data (BIAs) and develop cross-agency data center optimization or, if possible, consolidation opportunities/options. [FY13]

Phase IV:

- Select an option and define the short-term capital investment that yield the maximum long-term operational savings and develop the implementation plan.[mid-year FY13]

Project Sponsor is Steven Emanuel (CIO-MCG)

Project Manager is Steven Emanuel (CIO-MCG)

October 10, 2011: Report (written only) to the GO Committee.

- A Task Order Project Requirements (TOPR) was reissued in early March 2011 with added detail for cost analysis and sourcing options were received. New estimates for the

work efforts increased to \$1.5 and \$1.6M for the level of effort documented. Cost was prohibitive at this time.

- MCG OEMHS provided alternative approach to address BIA process via contract resources that existed (a partnership with University of MD and Towson)
- A BIA methodology simulating the TOPR requirements was developed by the UMD team and a two step user survey was developed. One survey was to develop business data about each application in the current portfolio, the second was technical data about each application. The 2008 Application Portfolio data from MCG ERP discovery process was used to set initial baseline of applications for the detailed survey drill-down.
- MCG kicked off the survey process on August 17, 2011 with a three week turnaround requested. This was extended two additional weeks due to the level of detail and volume of data
- Survey was completed mid-September 2011 and data analysis and report-out format have been discussed with MCG leadership.
- The University of Maryland meeting indicated that departmental visits and more extensive interviews are required to clarify survey data and ensure response consistency between different departments and applications.
- A detailed interview information survey tool is in draft format (as of 9/28/11), and is being circulated for feedback to ensure it is complete. The team will begin large department interviews upon completion of the detailed information survey tool

4. **GIS Strategic Plan—(Implementation Phase)** [Note: This is an ITPCC ITF Project, scheduled for final closeout by June 30, 2012. This is now an ongoing program]

Project Sponsor is MNCPPC;
Project Manager is Richard DeBose

October 10, 2011: Report (written only; see below) provided to the GO Committee.

- GIS Charter workgroup designated, met, and developed the GIS Governance Charter.
- On June 20, 2011, the ITPCC approved the GIS Charter, and approved the Policy Group membership.
- In July 2011, the GIS Policy Group convened and assigned a GIS Technical Advisory Group (GIS TAG) the task of identifying priority GIS purchases for FY13.
- The GIS TAG survey task is currently underway. Survey instrument is being finalized. GIS TAG approval of survey tool estimated in October 2011.
- GIS TAG review and analysis planned during November 2011.
- Recommendations to the CIO Subcommittee expected November 2011, with recommendations to the ITPCC currently targeted for December 2011- January 2012.